



# STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

**Working Title**

Citizen Services Bureau Chief

**Job Code Title**

Program Manager II

**Pay Band**

7b

**Job Code Number**

111917

**Citizen Services and Resource Management Division**

Citizen Services Bureau

**Fair Labor Standards Act**

Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Citizen Services and Resource Management Division administers the accounting, purchasing, safety, security, statewide facility functions; call center, forms design, one-stop business licensing coordination, and receipt and distribution of unclaimed property. The division includes the Financial and Asset Management Bureau and the Citizen Services Bureau. The Citizen Services Bureau operates the Call Center whereby citizens can call with questions, inquire about their tax accounts, and get the information needed to conduct business with the department; administers the One-Stop Licensing Program which is a one-stop shopping for businesses to register and renew their business licenses from numerous agencies participating in the program; advertises unclaimed property that has been turned over to the state in an effort to locate the rightful owners and processes claims for the return of the property; and coordinates the annual design of forms, returns, and instructions for administering taxes and licenses.

**Job Responsibilities**

The Citizen Services Bureau Chief is responsible for planning, developing, and directing four programs: the call center; forms design and distribution; one-stop business licensing; and unclaimed property. The bureau chief allocates financial and staff resources; plans and directs the programs and services of the bureau; administers bureau policies, administrative systems, operations, and budget; and coordinates special projects. The position reports to the division administrator and supervises bureau staff.

**• Citizen Services Bureau Administration 55%**

1. Reviews bureau policy and evaluates the impact of changes in technology, state and federal requirements, and department operations.
2. Monitors progress in the bureau's four programs: forms design; call center; one-stop licensing; and unclaimed property distribution. Identifies areas for program improvement and improved efficiency.
3. Manages call center staffing by monitoring call volumes and staffing resources. Determines staffing coverage for extended hours during the individual income tax season.
4. Acts as the liaison between the call center and other department work units and agency partners of the one-stop licensing program.

5. Prepares for, and participates in, quarterly One-Stop Board review meetings.
6. Responds to complex or contentious issues referred by staff. Handles unresolved customer problems or concerns.
7. Works with the state Print and Mail Services to finalize purchase orders. Defines the requirements for purchase of annual tax booklets, stand alone forms, and personalized payment voucher booklets including quantities of booklets and forms printed by the printing vendor.
8. Works with printing vendors to get tax booklets and payment booklets printed and shipped by the department's deadlines.
9. Manages the forms and design budget. Monitoring costs associated with tax booklet and payment booklet contracts. Determines whether to extend the printing vendor's purchase order based on quality of product and timeliness. Approves payment of printing bills for tax booklets and payment booklets vendors
10. Defines and tests data files for tax booklets and payment booklets.
11. Develops timelines for printing and mailing of tax booklets and payment voucher booklets.
12. Assigns form creation and updates to forms design team members. Coordinates review, changes, and finalization of forms and booklets with the forms design team and department business experts.
13. Provides assistance to other department work units in developing new and consistent forms.
14. Manages the distribution of unclaimed property by approving refund claims of unclaimed property over \$10,000. Monitors the timeliness of issuing unclaimed property refunds within statutory timeframe. Coordinates the annual publication of unclaimed property. This requires understanding timelines for scheduling and completion of publication in a variety of newspapers over a short period of time.
15. Coordinates inventory and refunds of safety deposit box contents remitted to the department and auctions of unclaimed safety deposit property in conjunction with the Business and Income Taxes Division.
16. Assists with issues related to refunds of dividends and sales of stock including review of files sent to Department of Administration. Contacts taxpayers if the social security number (SSN), employer identification number (EIN), or name on the 1099 does not match the IRS files.
17. Identifies changes needed in the department's integrated tax system (GenTax). Requests changes through service requests. Coordinates testing of changes and approval of changes being moved to production. Reviews and approves service requests for changes to GenTax and One Stop Licensing systems. Prioritizes the bureau's service requests.
18. Develops program evaluation measures and analyzes bureau operations. Monitors the use of services, funding, and staff. Assesses the need for additional staff and equipment. Develops and implements standards, policies, and procedures for the bureau.
19. Gathers input from the public, other governmental agencies, and bureau staff to develop proposals for legislation or administrative rules. Presents proposals to the division administrator and may present them before the legislature. Writes legislative bills and fiscal notes. Testifies at the legislature on behalf of the department.
20. Tracks program funding levels through accounting reports and approves expenditures. Directs the procurement, purchase, and inventory control of bureau equipment and supplies. Projects future expenditures and year-end balances; identifies areas of concern and discrepancy; and makes status reports to the division administrator to determine program budgetary actions.

- **Staff Leadership, Management, and Supervision 40%**

Incumbent is responsible for leading staff and managing the day-to-day activities of the bureau. Responsibilities include monitoring the progress of work plans, goals, and objectives and aligning them with the department's goals and priorities. Supervision and development of staff is imperative to a manager's success.

### Staff Leadership

1. Creates and maintains a high performance environment characterized by enthusiastic and positive leadership, direction, and a strong team orientation. Motivates employees to accomplish numerous division goals and objectives. Coordinates performance measures with staff. Encourages the development of new techniques or solutions to problems and assists with the resolution.
2. Readily adapts to changes in existing operations, programs, services, activities, and functions. Makes recommendations. Takes necessary action to implement or accommodate changes. Maintains a positive attitude in communication to staff even when difficult changes arise.
3. Maintains an atmosphere of safety within the bureau. Ensures adequate training for all staff in proper lifting techniques, sensible ergonomic practices, and work-specific safety opportunities.
4. Makes and accepts responsibility for decisions necessary to carry out the bureau's mission.
5. Accepts direction and feedback from supervisors and follows through appropriately.

### Management

1. Conducts strategic planning in coordination with the division administrator to develop and establish short and long-range plans. Participates in development of viable goals and objectives consistent with agency priorities.
2. Develops programs, policies, and procedures to assure the citizens of Montana that the department operates in accordance with the highest standard of integrity and ethics.
3. Evaluates state and national standards; new trends and technologies; bureau needs; and other factors to integrate requirements and resources into program plans.
4. Establishes priorities, deadlines, and work plans for program activities. Evaluates workflow processes, efficiencies, and problems to identify the most effective use of staff and material resources to meet goals and objectives. Appropriately allocates resources to accomplish assigned work by coordinating with other work units and programs and adjusting subordinate assignments as needed. Considers pertinent factors such as available resources, staff ability, timelines, and work load. Identifies the need for additional staff or resources while maintaining fiscal responsibility.
5. Plans, schedules, and assigns special projects. Initiates adjustments to reflect changes in overall division and agency goals, operations, and relationships to departmental divisions.
6. Reviews and monitors progress through meetings and consultations. Conducts staff meetings, disseminates data, and promotes information exchange for support and advancement of department mission and goals. Uses input from the staff to guide program responsibilities.
7. Recommends program budgets for staff and equipment. Reviews allocations, project plans and objectives, and expenditures.
8. Identifies information needs and develops reports, information systems, spreadsheets, and other tracking methods to monitor program status, work progress, bureau performance, and individual performance. Uses data to identify areas of concern, strengths, and weaknesses. Provides analysis and recommends solutions to department management to resolve problems. Oversees quality control of information and sources.
9. Prepares correspondence in response to requests or inquiries. Ensures that necessary reports, correspondence, documentation, administrative actions, files, and records are correctly prepared, completed, maintained, and processed in accordance with applicable guidelines and time frames. Ensures the bureau follows department expectations regarding disclosure and employee confidentiality.

### Supervision

1. Recruits and hires employees. Interviews applicants and makes appropriate selection recommendations according to applicable laws, rules, policies, procedures, and guidelines. Ensures proper training and orientation of new employees.

2. Establishes criteria for acceptable work behavior and performance. Promotes workplace efficiency and productivity by educating, mentoring, coaching, and correcting employee behavior. Encourages exceptional performance and improvement in areas of individual weakness. Develops and monitors corrective actions.
3. Appropriately reviews, recommends, and initiates personnel actions according to applicable policies, procedures, and guidelines. Carefully considers options available. Works with Human Resources to take appropriate disciplinary action as needed. Enforces disciplinary policies.
4. Recognizes and promptly resolves internal and external issues. Mediates personnel issues in a very timely manner.
5. Completes employee performance reviews. Defines goals and required results at the beginning of the performance review period. Communicates on a very regular basis with staff on progress toward those goals and results.
6. Determines the training needs of staff through analysis of program effectiveness, new technology and policies, and staff performance. Ensures consistency in the application of training opportunities for all staff. Develops and enhances on-the-job training opportunities to ensure staff is provided the needed training to fulfill their job duties including cross-training opportunities. Provides necessary information and tools to staff to complete any new tasks and duties
7. Communicates policy and procedures clearly and effectively in order to obtain desired results. Ensures staff adhere to rules, policies, procedures, and collective bargaining agreements.
8. Monitors and approves staff leave usage while ensuring adequate coverage is maintained.
9. Upholds and promotes the department's conviction to customer service throughout agency contacts as well as in communication with taxpayers. Staff is held accountable for providing the highest level of customer service to all those that they come into contact with.

- **Other Duties as Assigned 5%**

1. Performs other duties as assigned by the division administrator.

### **Job Requirements**

To perform successfully as a bureau chief, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Strong communication skills and the ability to communicate effectively and respectfully are required. The incumbent is required to analyze complex issues; identify others' underlying concerns and motives; deal with controversy and hostility in a professional and objective manner; establish effective relationships with others; and work effectively under pressure. Seasoned judgment in decision making is necessary since the work is performed with minimal guidance and within broad guidelines. It is essential that the incumbent has the ability to work independently but also as part of a team; maintain a high performance team; make sound decisions and be accountable for them; generate innovative ideas; and have personal initiative. The incumbent is expected to apply critical thinking skills; be a problem solver with the ability to identify and resolve tactical and strategic issues before they become problematic; resolve operational issues; elevate matters as necessary; recommend solutions; and effectively implement division changes and management directives. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

The incumbent must demonstrate professional knowledge of the principles and processes for providing customer and personal services including customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction. This position requires knowledge applicable state and federal regulations, statutes, and policies; public administration and management including strategic planning; project management; principles and methods of work planning; performance management including setting goals, objectives, and measures; operational and program planning; quality assurance methods; organizational development; project management; resource allocation; leadership techniques; governmental organizational structure, accounting, and budgeting; legislative and administrative rule

processes and guidelines; and state and department policies, procedures, and precedents. The work also requires knowledge of computers and database management including state and department information systems (GenTax, TAP, One-Stop licensing, "Where's My Refund", ORION, SABHRS); data collection, analysis, and reporting techniques; compliance requirements and practices; customer service standards; business communications; records management; state and federal funding requirements; agency policies, procedures, and guidelines; supervisory principles and practices; department and state personnel policies, procedures, and precedents; and employment law.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in accounting, business management, public administration, or related field and five years of job-related work experience including three years of direct supervisory and program management experience.
  - Work experience should include budgeting and working knowledge of the various tax types.
  - Other combinations of education and experience will be evaluated on an individual basis.

### **Department Core Values**

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

### **Working Conditions**

This position has considerable mental stress and pressure due to supervisory issues; workload; conflicting, multiple priorities; critical projects with hard deadlines; time constraints; significance of decisions made; the challenging nature of contacts with taxpayers, elected officials, etc.; and coordination of all functions of the bureau. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. Work hours may exceed 40 hours per week from time to time. During peak processing seasons and leading up to and during legislative sessions work hours routinely exceed 40 hours per week and may include working evenings and weekends. May involve minimal travel therefore a valid Montana driver's license is required. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

**Special requirements**

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

**This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.**

**Division Administrator Review:** The statements in this job profile are accurate and complete.

Signature: Steve Austin, Division Administrator      Date: August 2010

**Human Resource Director Review:** The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director      Date: August 2010

**Employee:** My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name (print): \_\_\_\_\_